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11 Sept 67

MEMORANDUM FOR: Deputy Director for Support

**SUBJECT: Guidelines for Contracting with Professors
and Other Staff Members of U. S. Educational
Institutions**

1. As you know on 12 July 1967 the Director approved a set of guidelines that are applicable immediately to the Agency in contracting with U. S. Educational Institutions and their Staff Members. The guidelines cover three situations: contracts with institutions; grants to institutions; and consultants and other personal services contracts.

2. This office is responsible for monitoring the last named situation, the guidelines for which are as follows:

"Consultant and other types of personal services contracts with professors or other staff members of educational institutions within the United States will be held to a minimum and employed only when necessary. Additionally, such contracts will, as a general rule, be made only after assurance is obtained that appropriate officials of the institutions concerned are aware of the proposed relationship *and do not object.*"

3. To bring consultant and other personal services contracts in line with the guidelines I am instituting the following procedures:

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(a) New Cases.

(1) Consultants. As set forth in approval by the Director, the DDCI or the Executive Director-Comptroller is required to hire a consultant. Future requests should include a statement that the appropriate management official of the institution concerned has been made aware of our proposed relationship and does not object. If the reverse is true and you wish to hire a consultant without making that official aware of the relationship or over his objection, the request should so state and a justification provided.

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(2) Other Personal Services Contracts. Requests for personal services contracts with professors or other staff members of educational institutions within the United States should henceforth contain a statement that the contract is necessary to further an essential function as well as the affirmative statement discussed in the paragraph above on consultants. Form 204 is the usual document employed to request preparation of a personal services contract. The statements can be inserted in section XVI, paragraph 64, of that form.

If you propose to hire an individual by contract without the knowledge of his institution or over its objection, the request should first be approved by the Executive Director-Comptroller or the DDCI.

(b) Existing Cases. To apply the new guidelines to existing contracts a case-by-case review within your directorate or independent office will be required. I ask that you designate one individual to be responsible for the review. Chief, Contract Personnel Division will work with your designee; Contract Personnel Division records will be available. If possible the review should be completed and a report forwarded to me by 22 September 1967 containing the following information:

- (1) Name of consultant or individual under personal services contract.
- (2) The component within your directorate or independent office administratively responsible.
- (3) Whether appropriate management officials of the institution concerned are or will be made witting of the arrangement.
- (4) If not, whether you intend to terminate the arrangement or seek approval from higher authority to continue it as is.

4. No definition of an appropriate management official is provided in the guidelines. In my opinion such an individual is one who occupies a position of broad executive responsibility and is authorized to speak for the institution on major policy matters. In most cases this would seem to require no less than the president or chancellor of the institution.

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Emmett D. Echols
Director of Personnel

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